

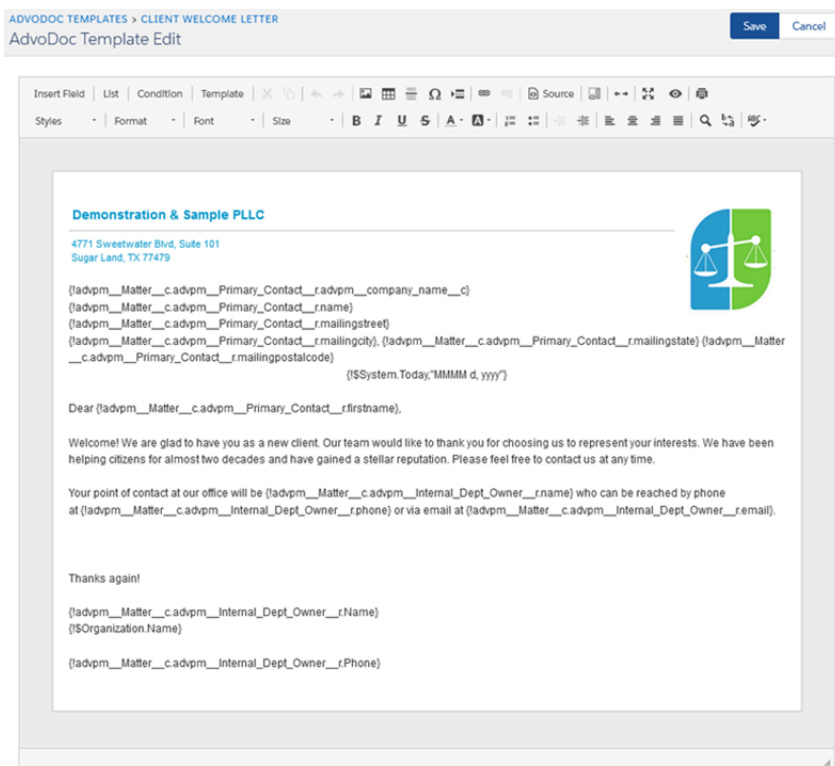
What is AdvoDoc?

AdvoDoc is a template driven document assembly application for generating new documents. Documents can be created on demand or automatically through the use of AdvoLogix business process automation tools.

AdvoDoc Overview

In general terms, AdvoDoc is similar to the mail-merge feature found in word processors. AdvoDoc has the added benefit of being fully integrated within AdvoLogix environment. This tight integration allows documents to be created within the AdvoLogix environment using both on-demand and automated document generation techniques.

What are the principal functions of AdvoDoc?



Creating Document Templates

AdvoDoc Templates provide the merge content for creating new documents. Templates are created with our built-in document designer and based on standard Salesforce.com merge token naming conventions. In short, the AdvoDoc template system allows data fields (and related lists) to be merged with pre-designed templates. Follow [this link](#) for more information regarding the AdvoDoc Template Designer.

Creating New Documents

Documents are automatically associated with the underlying matter (contact or account) the document was created for. New documents can be created on-demand or automatically through business process automation tools such as process builder/flow.

Functionality Comparison with Other Products

When AdvoDoc was conceived, it was meant to fulfill a very basic need in document generation. Below is a table that describes different functionality found in other top-rated companies that are solely for document generation.

Features	AdvoDoc	Other Document Generation Products
Archiving and retention		?
Automation	?	?
Bulk document generation	?	?
Compliance tracking		?
Conditional logic statements	?	?
Document classification		?
Drag and drop builder		?
Dynamic online forms		?
eSignature		?
File conversion		?

Features	AdvoDoc	Other Document Generation Products
File recovery		?
Forms for Salesforce		?
Generate documents from templates	?	?
Input wizard	?	
Multiple output formats		?
Template designer	?	
Training		?
Version control		?
Workflow management		?